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ABSTRACT

A theory of the role of exchange in interpersonal relationships such as marriage and friendship was proposed. Perceived exchange equity is almost impossible to attain in marriage because of greater sensitivity to self than to others. It was hypothesized that exchange-orientation is inimical to marriage adjustment, with exchange-exchange couples being less happy than other possible exchange combinations (exchange-nonexchange, nonexchange-nonexchange). An exchange-orientation, however, was hypothesized to be quite appropriate for limited or beginning friendships, and exchange-exchange couples should develop greater friendship intensity than other combinations. The data generally favored these hypotheses. (Author)

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A Theory of the Effect of Exchange-Orientation on Marriage and Friendship[1]

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The influence of exchange theories on the thinking of social psychologists and sociologists has been mounting steadily within the past decade and a half [Thibaut & Kelley, 1959, Homans, 1961, Blau, 1964, Murstein (in press)]. Although no writer has claimed that exchange embraces all interpersonal behavior, the writings of the aforementioned authors suggest that exchange pervades much of social relationships. Despite this pervasiveness, the concept of exchange remains murky and unclear. Exactly how equity operates within exchange is unclear, the problem of whether exchange is to be assessed objectively or subjectively is often avoided, and the implicit assumption that exchange is generally a good thing in all relationships--the flywheel of society as it were--has never been empirically verified. Last, the effect of an exchange-orientation on the quality of a relationship has never been investigated.

The intent of the present paper is to attempt clarification of the concept of dyadic social exchange and to consider the effects of exchange-orientation on two kinds of relationship: marriage and friendship. Finally, some data relating to the theoretical formulation are considered.

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Theoretical Considerations

Dyadic social exchange as defined here refers to an interaction between two people so that their behavior reflects the effect of the material comparison of each other's assets and liabilities for the relationship. Each person, in short, perceives his own

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degree of profitability to the other (his assets minus his liabilities) and the other's degree of profitability to him. Interaction for newly initiated contacts is maximized when the degree of perceived profitability is approximately equal. The reason is that as a function of our social encounters we receive feedback as to our assets and liabilities. From the point of view of those with whom we interact, our assets are rewarding and our liabilities are costly.

Individuals with strong assets such as, for example, physical attractiveness, poise, intelligence, and lack of neuroticism are able to attract others of commensurately high profitability. They could of course even more easily attract those of lesser profitability, but the value of such a conquest is diminished by the lack of status of such individuals (their rewarding power is low, their costs high).

On the other hand, individuals may aspire to unite with those of considerably higher profitability than themselves. Upward mobility, after all, is in the American tradition. Nevertheless, those of great assets and few liabilities gain little from association with individuals of inferior net worth; consequently, the moderately endowed individual risks rejection to the extent that he reaches above his station on the profitability ladder. Rejection is painful to the ego and the loss of self-esteem (high cost) it engenders leads the individual to avoid such rejections in future encounters. The individual therefore, exerts maximum effort and obtains the most profitable relationship when he sets his goal on someone of approximately his own rank on the assets minus liabilities continuum.

The assets and liabilities involved in the trading are not necessarily conscious. All that is required is that the individual respond behaviorally to these factors of exchange regardless of his

conscious acceptance and/or sensitivity to his use of them. Moreover, equity of exchange in no way necessitates that the assets and liabilities involved be similar. All that is important is that the experienced profitability by one individual be approximately equal to that experienced by the other.

There is probably a considerable degree of correspondence between objective assessment of assets and liabilities and subjective perception of them due to constant feedback from interactions with one's associates. There are, nonetheless, examples of great objective inequity in relationships. A handsome man is seen with a woman of mediocre attractiveness. "I wonder what he sees in her?" may be the quizzical question of a bystander. Quite possibly, she possesses compensating qualities such as greater intelligence, interpersonal competence, and wealth than he, of which the bystander knows nothing. It is also possible that his self-concept was so damaged as a result of childhood experiences, that he consistently underestimates his assets and exaggerates his costs to others; thus he may be at perceived equity in the relationship (both members may think their partner greatly exceeds them in ratio of assets to liabilities, but only the woman might be objectively correct).

Another case of compensatory exchange might be indicated if an aged statesman proposed marriage to a young beautiful woman. He would probably be trading his prestige and power for her physical attractiveness and youth. It is possible to argue that the two individuals in question love each other and do not crassly weigh what they get from each other through marriage.

In reply to this possibility, two things may be said. First, exchange and love are not necessarily opposites. Many people love

that which rewards them greatly and whose cost is small. They love that which gives them the most profitable exchange ratio.

Second, if relationships were not based initially, at least, on exchange, it would be impossible to demonstrate that individuals who, for example, lack assets in an area important to marital choice, must compensate by possessing high rewarding capacity in other areas important to marital choice.

It is noteworthy in the entertainment field that there are a number of well known blacks (usually men) who have married unknown whites. The contary occurence of well known whites marrying unknown blacks is extremely scarce. What happens, apparently, is that black as a skin color is negatively valued by much of American society. Being a woman is also negatively valued; hence a well know black entertainer would trade his superior status and earning power against the white color of his spouse and other assets that she might possess. A female black entertainer would be in a somewhat less advantageous position than a male black entertainer by virtue of being a woman as well as a black; hence there should be (and apparently are) fewer examples of well known black women marrying white men than that of black men marrying white women. There is actually no shortage of empirical examples of "compensatory exchange" in this and other areas as reviews of the data have shown (Murstein 1971, 1973, in press). Lightness of skin color in black women has been shown to be associated with upward mobility as has physical attrativeness for women in general. Less attractive married women tend to be better educated than more attractive women, and blacks marrying whites are better educated than blacks marrying blacks. Last, one study showed that individuals who travel outside of their immediate community to visit friends

showed greater value similarity with these friends than with friends within their community.

The foregoing suggests that equity within exchange functions in the formation of dyads, but it does not necessarily follow that exchange plays as great a role in the maintenance of already formed dyads. Maintenance depends on four relatively independent factors: (1) equity of exchange, (2) comparison level for alternatives (CL_{alt}), (3) self role-fulfillment and (4) importance and satisfactions of non-dyadic relationships.

1. Equity of exchange. Although individuals may be balanced for exchange value at the onset of their relationship, the balance may be tipped for a number of reasons. First, the valuation of an asset of the other may be weakened. The husband may have valued the willingness of his spouse to work and her ability to cook over the mediocrity of her looks when they first married. Now that he is a wealthy executive, he may find a working wife no asset, and may opt for a professional cook. His wife's assets are no longer in demand. Worse yet, her beauty rating has declined still lower so that her net worth is now far below his own.[2] The imbalance in exchange value may result in pressure towards the dissolution of the marriage on the part of the husband.

2. Comparison level for alternatives. The ~~The~~ CL_{alt} was introduced by Thibaut and Kelley (1959) to indicate that mere imbalance in exchange does not lead to dissolution of the relationship unless a viable alternative exists for at least one of the members of the couple. The wife of an alcoholic may be long suffering, but if she decides that she could not do better in another relationship, she may elect to remain in an unprofitable relationship for fear that no relationship

or another one might be even more unprofitable. Individuals of low market value with regard to interpersonal relationships, thus, are most apt to utilize a high threshold for CL_{alt}, whereas high asset persons probably have low CL_{alt} thresholds.

3. Self role-fulfillment. Although exchange can only occur between people, rewards can occur within persons. An individual who returns good for evil is clearly not functioning according to exchange. It is also unlikely that he returns good for evil only because of his CL_{alt}. His behavior is most likely accounted for by his concept of role he must play vis-a-vis others. He is rewarded not by the ingratitude of the recipient of his good deeds, but by the pat on the back he gets from his fulfillment of his role of how a good person behaves. For such a person to repay evil with evil might be an example of exchange equity, but the failure to meet his standards of decent behavior would result in the cost of guilt. Self role-fulfillment is widespread. Mothers dote on their offspring, philanthropists open their purse strings to the needy, and men sometimes offer their seats to ladies in the subway train in order to maintain their self-image rather than in the hope of recompense.

4. Non-dyadic influences. If an individual's experiences outside of his dyadic relationship are highly satisfactory, they may serve as a buffer against the dissolution of the relationship even though, of itself, the relationship may be unprofitable. For example, an individual may have a satisfactory relationship with his children if not with his spouse. To break up his marriage might adversely affect the relationship with his children. Or, he may have many friends who serve to supply many of the social needs not found in his marriage. Although he may be unhappy in his marriage, their compensatory

satisfactions serve to make his overall living situation satisfactory.

These four factors determine the degree of commitment to the preservation of a relationship. If exchange is equitable, self role-fulfillment is achieved, no better alternatives are seen on the horizon, and non-dyadic factors reinforce the dyadic relationship, the relationship should indeed be a sturdy one. But even if CL_{alt} is low (many other opportunities) the exchange level is grossly out of balance, and non-dyadic compensations are few, such is the strength of self role-fulfillment for some people, that they will continue the relationship.

There undoubtedly is considerable variability in the kinds of behavior that lead to self role-fulfillment. In the present paper, however, only one dimension and two personality types will be considered. The dimension is exchange-orientation and the two types are exchange-oriented and nonexchange-oriented. The prototype of the first is the individual who feels uncomfortable when someone does him a favor until he can repay it. He would also feel badly if an individual he loved did less for him than he did for the individual.

Contrariwise, a nonexchange-oriented person might believe that if you loved someone you didn't keep a balance sheet on what each did for the other. To love someone, for such an individual, is to forgive his transgressions and accept him.

Implications of Exchange (E) and Nonexchange (NE) Types for Marriage

It is hypothesized that an E-orientation is deleterious to marital satisfaction. The reason for this may not be self-evident. If each individual scrupulously adheres to the laws of fair exchange and does his part, should not harmony prevail? Possibly so if an outside party (counselor?) could provide feedback to the participants

on just how much each was contributing to the exchange. In fact, however, equity of exchange is generally evaluated by the members of the couple themselves and is, therefore, a subjective evaluation. This fact poses a grave threat to the possibility of a couple ever agreeing among themselves on whether equity exists in the exchange aspects of their relationship. The reason is that most individuals are quite sensitive to what they do for others but somewhat less aware of what others do for them.

Over a period of time, therefore, assuming objective equity of exchange, each person might think that his own input of work somewhat exceeded that of his partner. Whether this state leads to dissatisfaction, therefore, would depend on the reactions of each individual to perceived violation of equity of exchange. Irriation ought to depend on the amount of insensitivity to the other's contribution and to the importance placed on a failure to achieve equity of exchange.

The tendency to be insensitive to the contributions of others is important to study, but it is, unfortunately, very complex to reduce to operational measurement. In the present case, therefore, an attempt has been made to measure the importance of an equity philosophy to the individual. It is assumed that individuals who can be described as E-oriented are people who are most disturbed when they perceive an imbalance in equity in the relationship. Accordingly, in marriage, it is predicted (Hypothesis 1) that an E-tendency should be negatively associated with marital adjustment.

But, there are two people in a marriage. What is the effect of various combinations of E-orientation? If we categorize each person in dichotomous fashion as exchange-oriented (E) or nonexchange-oriented (NE), there are four possible marital combinations listing

the woman first and the man second (NE-NE, NE-E, E-NE, E-E).

In the first case (NE-NE) the wife and the husband are both non-exchange-oriented. They do not weigh their actions very much on a tit-for-tat scale and, consequently, for the reasons adumbrated earlier, they should be happiest in marriage compared to the other combinations. The mixed combinations (NE-E, E-NE) should be less happy than the NE-NE group because one member is weighing respective contributions to the marriage carefully and probably in a biased fashion. Yet the other member is NE, meaning that he (she) is prepared to avoid emotional bookkeeping with its careful weighing of each other's contributions. The E-partner can arrange the scales in what he thinks is an equal work load, and unconsciously or consciously bias the task responsibility in his favor, and still find his partner willing to absorb a somewhat higher than fair share of the dirty work. The NE-partner, in short, serves as a blotter to absorb the exploitive tendencies of the E-partner. It is predicted, therefore (Hypothesis 2), that, at the very least, the E-E combination should be signficantly less happy in marriage than the pooled three other combinations (NE-NE, NE-E, E-NE).

Friendship

The combination best suited for marriage is not necessarily best for friendship. In the present study, the practical limitation of using college students as subjects dictated that the friendships depicted be situation-dependent (formed at college), and that they not be more than four years long (average college stay), with most being of considerably shorter duration. In short, the friendships considered were of relatively short duration, with not necessarily very extensive involvement.

The factors that make such relationships attractive to the participants should be, as Aristotle noted over two thousand years ago, utility, entertainingness, and goodness (Aristotle, 1952). Such friendships may eventually develop into profound, committed relationships, but in the early stages they depend much on equity of exchange. In this respect they differ considerably from early marriages. For one thing, the role definition is quite different in the two types of relationships. Although a married individual may not actually know his spouse very well, he has been well indoctrinated as to what a loving spouse does, and it is unlikely to be quid pro quid behavior--not at first anyway! Further, the CL_{alt} is fairly high for married status. There is a great deal of investment, financial and emotional, in a marriage, and few individuals are able to terminate a marriage without a great deal of anguish and cost, psychological and financial.

By way of contrast, role definition is not very clear for friendship. There are all kinds and types. There is the friend you tell your troubles to, the one who is so witty, the one you play tennis with, etc. It is uncertain how far to commit oneself to a friend during the first months or even years of friendship because, for one thing, contact is not so frequent as with a spouse, and one is unsure of how the other really feels about the friendship; consequently, behavior follows a reciprocal model. Each imitates the depth of the other's communication. Perhaps one is a little bolder, so that if all is congenial, the relationship marches to a somewhat deeper level.

The CL_{alt} is also much lower than for marriage. One is not under as much pressure, both external and internal, to see a friend. It is possible to limit contacts to just the level desired. It is also much easier to terminate a friendship than a marriage. One can do it

gradually with much less trauma than, as in marriage, gradually limiting exchange with an individual with whom one lives.

Last, there are usually fewer non-dyadic factors which would tie an individual to a friendship than exist in marriage. Individuals in marriage may remain together because of their place in the community, tax purposes, and concern for the children. These reasons are not present in friendship, and if the exchange rate is not mutually perceived as equitable, there is little pressure to maintain the relationship. Our third and fourth hypotheses therefore are as follows: 3. For situation-dependent, developing relationships, an E-orientation is conducive to friendship intensity; 4. An E-E combination of friends is mutually conducive to greater friendship intensity than any other combination (E-NE, NE-E, NE-NE).

Before getting to the actual pilot studies testing these hypotheses, a clarification should be made between an individual's orientation and his actual relationship. E-type individuals probably do commit themselves to others in nonexchange relationships and NE-individuals, no doubt, enter into exchange relationships. What the orientation measures is a more or less general tendency to approach interpersonal social relationshps in a characteristic manner. An E-individual is loath to commit himself until he gets proof that the other cares for him. He tends to feel uncomfortable, therefore, when another does things for him that create an imbalance in the exchange rate. On the other hand, he expects that his good deeds will be reciprocated by the other.

What makes an individual into an E or NE-type is conjectural at this point. Possibly, E-individuals are more anxious in interpersonal relationships. They may be afraid that others will take advantage

of their "good nature"; hence it would not be surprising to find them high on paranoic tendencies. They may eventually enter into "commitment" relationships, but the other individual may have to prove himself before such a relationship can be accepted. In addition, they may revert to type within a commitment relationship; that is, they may perceive inequities in work loads and be quick to feel that even within committed relationships they are apt to be taken advantage of. The verification of these possible behavioral and personality correlates of E and NE-types, however, must await further research.

A Test of Exchange and Marriage Adjustment

A group of 40 married couples was contacted,[3] and a packet containing 44 items purporting to measure exchange-orientation, the Locke-Wallace short form marriage adjustment scale (1959), and a background questionnaire was given to one of the spouses (the wife in 38 of the 40 couples). A packet was also left for the spouse along with two separate stamped envelopes to be mailed back when the forms were filled out. The subjects' occupations ranged from lower middle class (janitor) to highly educated businessmen and educators, with the distribution being skewed toward the upper level. The subjects were promised feedback, but told not to communicate with each other before mailing the packets, as the value of the study and of the feedback to them was contingent on their fulfilling these conditions. All of the packets were eventually returned.

The exchange-orientation test of 44 items was scored on a 5 point scale from Agree completely (5) to Strongly disagree (1). The exchange score of each item depended on favoring the exchange-orientation or disagreeing with a nonexchange orientation. The items

were then scaled by the Likert method to yield 23 items which differentiated upper and lower quartiles of total scores at the .05 level or below. Examples of the items which survived the scaling are "If I do dishes three times a week, I expect my spouse to do them three times a week," and "It does not matter if the people I love do less for me than I for them." Agreement on the first of these items and disagreement on the second would be scored in the direction of exchange. The correlation between exchange and marital adjustment for men was .43 ($p < .01$), and for women it was .30 ($p < .05$), thus confirming Hypothesis 1. Each sex was then dichotomized at the median for exchange for the sex, and each couple then classified into one of four groups of subjects (NE-NE, E-E, NE-E, E-NE).

Hypothesis 2 predicted a significant difference between the E-E group and the pooled others. This hypothesis was not supported, although a clear trend ($t = 1.48$, $p < .10$) in the direction predicted is apparent. The discussion of the implications of these findings will be considered after considering Hypotheses 3 and 4 dealing with friendship.

A Test of Exchange and Friendship

The subjects consisted of 42 college undergraduates at a liberal arts college drawn from one dormitory.[4] The subjects were given a packet containing the Murstein Friendship Intensity Scale and the Exchange questionnaire of 44 items. The Friendship Intensity Scale (Marsden, 1966) consists of 11 items selected by the Guttman technique and involving behaviors associated with progressively stronger friendship (e.g., including items ranging from inviting someone to a party, to confiding the most intimate details about one's feelings). The scale has a coefficient of reliability of .91.

The exchange questionnaire was the same as that used with the married couples except that the word "friend" was substituted for the word "spouse." Twenty items were selected for the final exchange scale via Likert Scaling. The lie scale of the MMPI was also included as a filler to disguise the intent of the test somewhat and to provide evidence of distortion. No severely elevated L scores were found.

The subjects were instructed to give the second packet to a friend of the same sex to fill out, and the same cautions expressed earlier to married couples were repeated. The subjects consisted of 17 all female pairs and 4 all male pairs. No background information was collected, but the vast majority of subjects in this relatively homogeneous school ranged from middle to upper-middle class backgrounds. The ages of the male and female subjects respectively were $\bar{x}$ 18.00, S.D. 0.00 and $\bar{x}$ 19.79, S.D. 1.15. The mean length of friendship overall was approximately one year, the range being 1 to 4 years.

The third hypothesis that E-individuals would show greater friendship intensity than NE individuals was supported via an F test ($p < .05$). In addition, the fourth hypothesis that E-E friendship couples would manifest greater friendship intensity than other combinations was likewise supported by a t test ($p < .05$).

Discussion

The results of the marriage study supported the hypothesis that an E-orientation is detrimental to marriage adjustment, but the hypothesized deleterious combination (E-E) did not quite show significance. In a pilot study such as the present one, there are several possible explanations for this finding apart from the obvious one

that the hypothesis may be incorrect. Although the participants were told not to communicate with each other, no actual supervision of the subjects was made while they took the inventories, and the actual extent of communication is unknown. In addition, marriage adjustment is clearly a multiply determined variable, dependent on many non-dyadic and dyadic factors other than exchange-orientation. Moreover, the scale of exchange was a crude one. A factor analysis of the items has indicated that exchange-orientation and commitment are not bipolar opposites but independent factors, which is why in anticipation of this finding the scale continuum was referred to as exchange-nonexchange rather than exchange-commitment.

In addition, observation of sex differences on the items suggested that men and women differed in the kinds of exchange with which they were in agreement. Women were most sensitive to being taken advantage of in interpersonal relationships, whereas men were more concerned about less interpersonal factors such as equal time in visiting relatives and doing the dishes.

Turning to friendship, the support of both hypotheses seems to support the proposed theory of the role of exchange in friendship. However, it is not known how much the results were due to the situational nature of college friendships. It is possible that an exchange-orientation eventually becomes deleterious to established friendships. Regrettably, no questions about the kind of friendship were asked, so no further analysis of the present data can shed light on this question. The two studies, in short, should be regarded as no more than suggestive rather than definitive support for the theory advanced.

These data, nonetheless, should serve to question the value of

an exchange-orientation for all kinds of interpersonal relationships, and to view it as perhaps most optimal in a limited friendship or in the developmental stage of a more profound relationship such as marriage.

Finally, it is suggested that exchange-orientation may be an extremely important personality dimension with important implications for the kinds of interpersonal relationships an individual forms and for the satisfactions he derives from these relationships. It is our hope that the present article will serve as a preamble to more extensive research on this dimension.

Footnotes

1. Some of the ideas in this paper originated with Nelly K. Murstein.
2. The man's looks would also decline of course, but the status of men in society is generally both greater than that of women and less dependent on physical attractiveness because as the more powerful sex he has decreed it so; consequently, age and diminished attractiveness diminish her exchange value more than his.
3. The study was carried out by Marcia Goyette.
4. The study was carried out by Mary Cerreto.

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